



## 2016: Trends to Watch in Wealth Management

" 2016: Trends to Watch in Wealth Management " is the latest addition to MarketResearchReports.Biz industry research reports collection.

The face of global wealth management is very different to five years ago. Many of the large international players have gone or are undergoing significant restructures as they adapt to the post-financial crisis world. The universal banking model of old is diminishing and many players are stepping back from investment banking. At the same time, banks are now much more selective in their approach to global expansion – no longer is it a case of the more countries the better. Today's wealth managers are having to slim down and hone their propositions. The previously rich pickings of the offshore wealth management industry are becoming ever slimmer with the advent of the OECD's Common Reporting Standards; meanwhile the march towards commission bans is pushing the industry to a fee-based advice model. All of this, together with advances in the digital world and fintech disruption, means wealth managers are being pushed to rethink their approach to the delivery of investment advice and who they deliver it to.

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### Key Findings

- Australia, the Netherlands, and the UK are no longer the outliers when it comes to commission bans, with Canada, the EU, Hong Kong, and South Africa all moving to implement full or partial bans. The ultra-high net worth (UHNW) segment is the fastest-growing, and wealth managers from Credit Suisse to Deutsche Bank are actively seeking to increase their assets from this target group.
- Cuts within investment banking divisions will have an impact on European wealth managers, both as a form of referral to private banks and in supporting entrepreneur clients.
- The robo-advice space is likely to undergo consolidation, with incumbent wealth managers moving to acquire providers as a means of gaining a foothold in the automated investment space.

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## **Synopsis**

“2016: Trends to Watch in Wealth Management” informs wealth managers and their strategy teams of the key developments emerging across the industry and how best to respond to these changes. The report examines developments across a number of key areas, including regulation, product and service trends, and asset allocation drivers. Specifically the report: Analyzes the impact of regulatory developments in the offshore space, such as the OECD’s Common Reporting Standards and Automatic Exchange of Information.

- Considers the consequences of the steady march towards commission bans in markets such as Canada, Hong Kong, and South Africa.
- Assesses the impact of digital disruption across the industry, particularly the emergence of the automated advice space.
- Examines the drivers for the increasingly selective approach wealth managers are taking (or not taking) to global expansion.
- Reviews the latest asset allocation trends and what is driving the growth of equities and alternative investments in particular.
- Investigates the growing trend of cutting back investment banking operations at universal banks, and the impact this will have on the industry.
- Draws on our 2015 Global Wealth Managers Survey of 343 executives to provide fact-led insight.
- Reviews developments tracked in our Wealth Management Competitor Tracker of over 100 companies.

## **Reasons To Buy**

- Understand the key trends impacting the wealth management industry in 2016 and how to respond.
- Get ready for the advent of the OECD’s Common Reporting Standards by finding out how you need to prepare.
- Learn how HNW asset allocation preferences are set to evolve in 2016 and how you should respond.
- Gain insight into the impact of digital disruption across the wealth management value chain and advice on how technology could help your business.

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Equities will continue to dominate in the typical HNW portfolio  
The mainstreaming of alternatives will continue in 2016  
Wealth managers should be aware of the various reasons driving demand for alternatives

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